



Chicago Metropolitan  
Agency for Planning

**JUNE 30, 2014**

**PRE-BID INFORMATION SESSION**

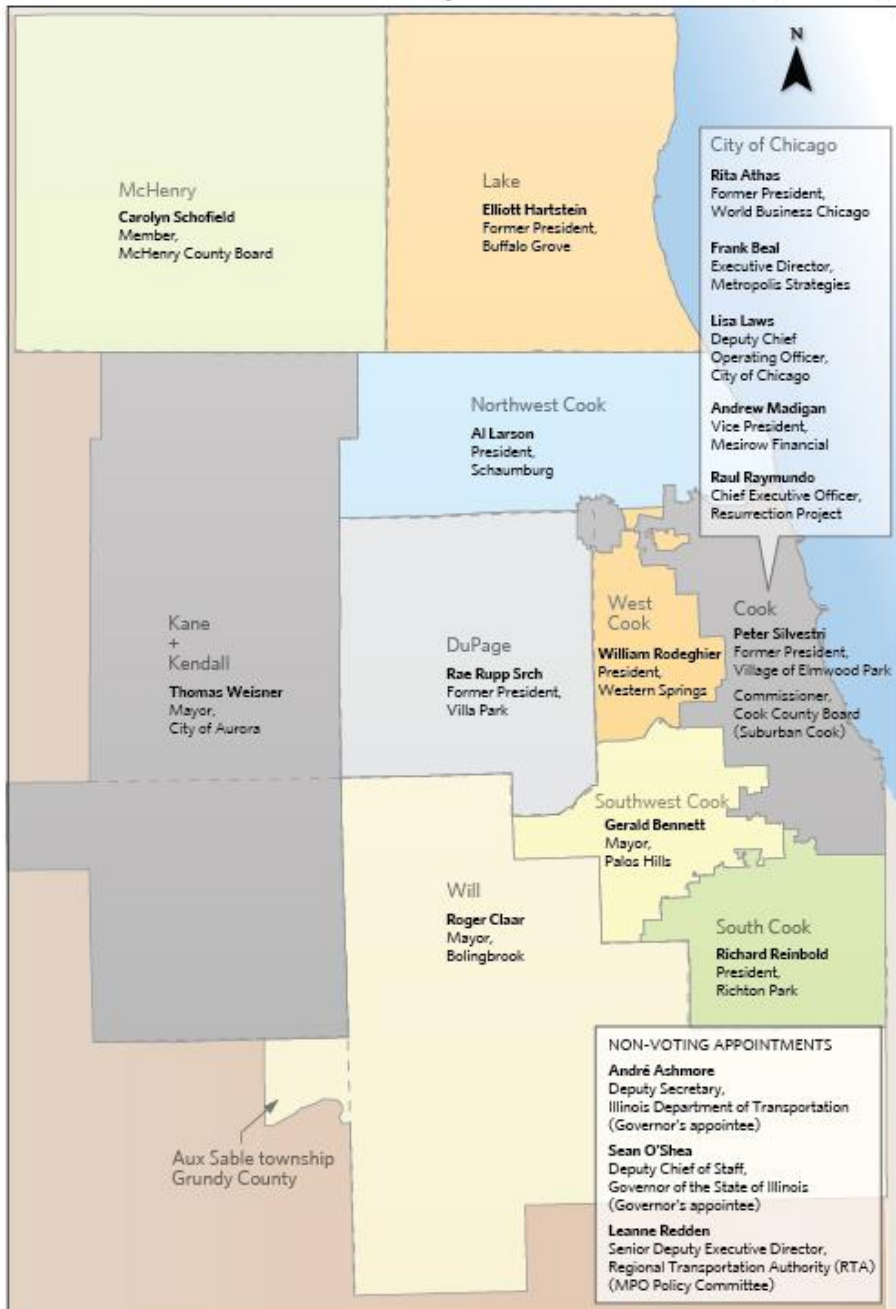
**ASSISTANCE WITH SHARED SERVICES AND  
JOINT PURCHASING STUDY:  
OSWEGO, MONTGOMERY, AND YORKVILLE**



## BACKGROUND: CMAP

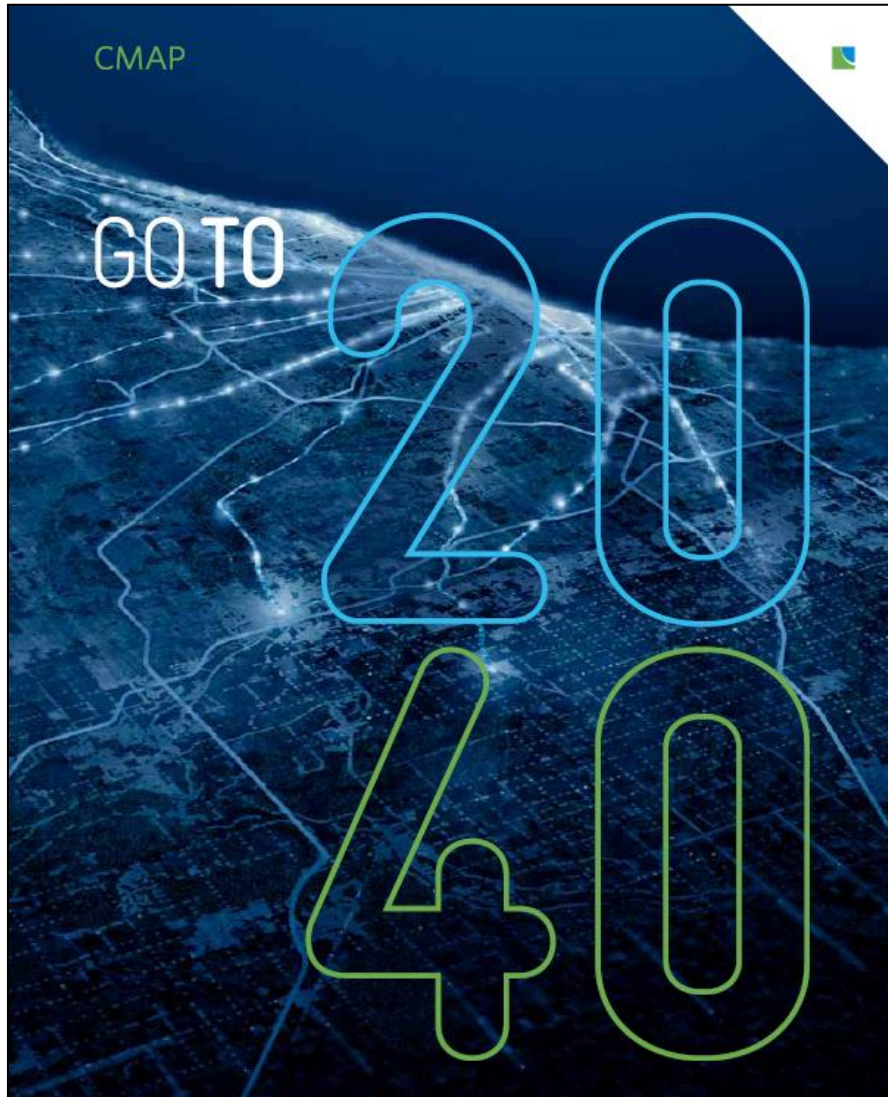
Formed by state law in 2005  
to integrate planning for  
transportation and land use

Seven-county area, with  
geographically  
representative Board



# GO TO 2040 COMPREHENSIVE REGIONAL PLAN

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Comprehensive, long-range  
plan for Chicago  
metropolitan area

Adopted by CMAP Board in  
October 2010

Forms the basis for all of  
CMAP's work

# LOCAL TECHNICAL ASSISTANCE (LTA) PROGRAM

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Purpose is to implement GO TO 2040 plan through direct assistance to communities

Program was initially funded by HUD – now relies on variety of sources, including federal transportation funds

Over 70 projects complete, 50 projects ongoing, with more under development and consideration

Most projects are led by CMAP staff; some include assistance from outside contractors for some or all project elements

# BACKGROUND AND ADMINISTRATION

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Purpose: select a contractor to assist with an ongoing LTA project: service sharing and joint purchasing for Oswego, Montgomery, and Yorkville

Assistance will be small-scale, with CMAP doing the majority of the work on this project – this RFP is *not* for overall management of the project by the selected firm

CMAP staff will devote 1,000 hours of time to this project, and the selected contractor is expected to devote 100-150 hours

# PROJECT BACKGROUND AND DESCRIPTION

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Project is meant to help Oswego, Montgomery, and Yorkville coordinate and jointly provide municipal services – including public works, public safety, planning and zoning, economic and community development, and administrative operations

Should result in immediate service sharing strategies, as well as process for ongoing collaboration among the communities

Final deliverable will not be a conventional plan – opportunities for collaboration will be identified and acted up throughout the process

# CONSULTANT ROLE

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1. Assessing municipal services
  - CMAP will review existing municipal services in the communities, including focus groups with municipal staff. Deliverable is Municipal Service Assessment report, which recommends strategies by service area, due in December 2014.
  - Consultant will play significant advisory and guidance role, but not lead preparation of materials. Consultant will review and provide feedback to CMAP on the Municipal Service Assessment document, and will attend three to six of the focus group workshops.

## CONSULTANT ROLE (continued)

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2. Developing shared services/joint purchasing recommendations
  - CMAP will provide an overall framework for communities to continue to work together after study completion. Deliverable is memorandum directed to village managers/administrators, due April 2015.
  - Consultant will advise CMAP during the recommendations development process, and provide detailed feedback on draft deliverables.



# PROPOSAL CONTENTS

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1. Identify consultant team, including any subcontractors.
2. Describe approach to interacting with CMAP and the three municipalities. Demonstrate experience working in advisory role to public sector clients.
3. Discuss logistical, financial, and political challenges and opportunities and how to address them. Demonstrate experience and knowledge of municipal operations, finance, services, management, and service sharing.
4. Provide three examples of the firm's relevant experience, including an estimate of cost of each example.
5. Provide at least three references.
6. Submit Attachment 1, "Price Proposal Form", specifying hourly costs for all staff, both for the first year of the contract and the option year.
7. Submit other required forms – Attachment 2 and Attachment 3.

# SCHEDULE

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<b>July 23:</b>	Submissions due at 3:00 p.m.
<b>August:</b>	Interviews with finalists
<b>September:</b>	Enter into contract

**QUESTIONS?**